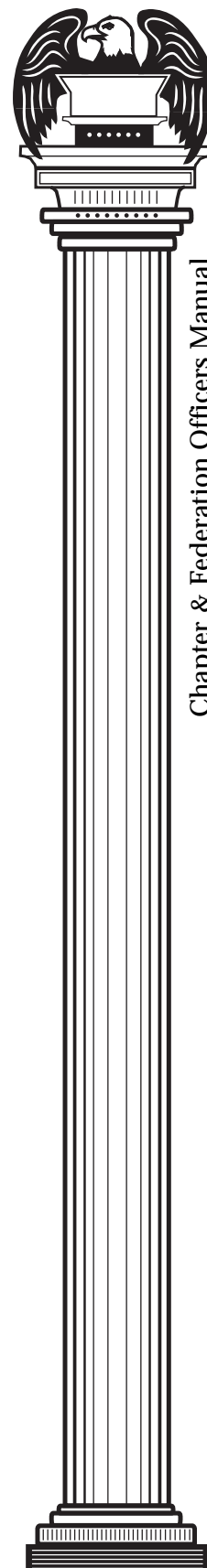


Chapter & Federation Officers Manual

A guide to support and maintain chapter and federation operations.



Chapter & Federation Officers Manual

NARFE
PROTECTING YOUR FUTURE

Since 1921

Table of Contents

This manual is provided to help chapter and federation officers perform their duties efficiently. It is not mandatory that officers follow it to the letter; it is a guide and allows for chapters and federations to meet individual needs.

Outgoing officers should pass on this manual to their successors, to enable forward movement in chapter and federation activities and programs.

National Headquarters will furnish all administrative materials and supplies necessary for support of chapter and federation operations.

Suggestions for improving this manual are welcome. Send to: National Secretary, NARFE, 606 N. Washington Street, Alexandria, VA 22314-1914

Section One: Chapter Officers & Operations	1
The Individual Member	2
The Chapter	2
Duties of Chapter Officers	3
Other Chapter Officers.....	5
Election of Chapter Officers	6
New Officers.....	7
Chapter Committees	7
Chapter Meetings	10
Communications	11
NARFE Service Center Clearinghouse.....	12
Section Two: Federation Officers & Operations	13
Federation Officer Duties.....	14
Organizing a New Chapter	16
Closing a Chapter	17
Reactivating a Closed Chapter	17
Section Three: Other Information	19
Installation of Officers	20
National Conventions	20
Awards	22
Obtaining a NARFE Banner	23
Appendices	25
A-Records Management and Quick Reference Chart	26
B-Checklist of Chapter Operations	28
C-Membership Action Plan	30
Attachments	33
F-37 Chapter Record of Membership	34
F-38 Treasurer's Monthly Report	35
Index	37

Section I: Chapter Officers & Operations

The Individual Member

The effectiveness of any chapter begins with the individual member. Without members, there is no organization. Without an organization, there are no group benefits. Within any organization, each member, at one or more levels of activity, can participate in building a strong, unified group acting in the interests of all civil service annuitants.

The Chapter

Group benefits accruing to NARFE members are obtained principally through the concentrated support of several hundred thousand members operating through more than 1,500 chapters. All members should be encouraged to take part in chapter activities and strive to stimulate the interest and participation of fellow chapter members. Chapters provide the voices and votes constituting the collective thoughts and positions on issues, which federations and National Headquarters follow in working to protect the earned retirement benefits of all civil service annuitants—whether or not they are NARFE members.

ADVANTAGES DERIVED FROM CHAPTER MEMBERSHIP

- Chapters and federations participate in setting national goals, and national and state legislative programs;
- Chapters can often influence municipal, town and county issues affecting all seniors as well as NARFE members;
- Members have an opportunity to serve as a chapter or federation officer or both, thus participating in setting local and state policies;
- Members have an opportunity to serve as a delegate to federation and national conventions and participate in setting NARFE agendas for state and national objectives;
- Members receive direct assistance with questions on annuities, health benefits, Medicare, life insurance, tax withholding, survivor benefits, Social Security, etc., from the chapter service officer;
- Chapters and federations keep members informed on local, state and national issues affecting NARFE members through chapter meetings and newsletters;
- Chapter meetings offer fellowship and social interchange with other federal retirees, survivor annuitants and current employees, and renewal of friendships with former associates;
- Chapters offer many occasions to broaden contributions to, and benefits from, increased social, political, economic and civic activities;
- Chapters bring together and represent local federal annuitants, their spouses and survivors, and eligible current employees and their spouses. Chapters should recruit other members to strengthen the chapters and Association, lend assistance to colleagues, and protect the current and future retirement and health benefits of all civil service annuitants.

Duties of Chapter Officers

Officers' duties are set out in chapter bylaws, or the president may assign them in accordance with applicable bylaws and NARFE policies. The following are intended only as guides; variations are expected. Training pamphlets are available for *Chapter President/Vice President, Secretary, Treasurer, Service Officer, Public Relations Officer, Legislative Officer* and *Membership Chair*. There are no charges for pamphlets, which can be ordered from National Headquarters on the F-18, *Requisition for Printed Supplies*.

CHAPTER PRESIDENT

- Should be familiar with NARFE's organizational structure, the National Bylaws (FH-4), the chapter constitution and bylaws, and NARFE policies at all levels;
- Presides* at the chapter and executive committee meetings and conducts business in an orderly, impartial manner;
- Appoints standing and special committees as needed;
- Ensures that each officer and committee member is familiar with this manual and with his/her duties and follows up to be sure they are operating effectively;
- Ensures that the chapter secretary reports to National Headquarters on Form F-7, *Chapter Officer Roster*, the names and offices of all chapter officers and committee chairs, chapter dues, and meeting dates and places at least once a year, and more often if changes dictate.

VICE PRESIDENT (First vice president, if more than one)

- Presides* at chapter and executive committee meetings in the absence of the president;
- Performs other duties specified in the bylaws as assigned by the president.

SECOND VICE-PRESIDENT (where applicable)

- Presides* at chapter and executive committee meetings in the absence of the president and first vice president;
- Performs other duties specified in the chapter bylaws and as assigned by the president.
- Uses NARFE publications (*NARFE* magazine, *Quarterly News*, etc.) for information to give to chapter members during chapter meetings.

SECRETARY

- Records the minutes of chapter proceedings;
- Maintains chapter files and preserves all permanent official documents, including the charter, constitution, bylaws and other organizational papers.

**Note for presiding officers: Parliamentary rules provide a common-sense method under which an organization can base concerted action on the will of the majority, but only after reasonable discussion during which the minority has the right to be heard. The majority can usually take care of itself; the presiding officer is responsible for protecting the minority's rights. Rules should be applied so as to permit the group to achieve its major purpose: taking action to make decisions within a reasonable time.*

- Maintains roster of chapter members, officers and committee chairs; reports changes in officers, committees chairs and chapter dues to National Headquarters Federation & Chapter Services section on Form F-7 no less than annually; reports chapter dues to National Headquarters Federation & Chapter Services section by January 1 of each year (National Headquarters needs **at least 90 days** advance notice for dues changes);
- Maintains a list of committees and a file of committee reports;
- Conducts the chapter's general correspondence (correspondence that is not a particular function of another officer);
- Orders necessary supplies and forms for the chapter; uses form F-18, *Requisition for Printed Supplies*, for letterhead, envelopes, etc; uses the NARFE•Mart order form (or contacts the Marketing/Meeting Planning office at National Headquarters) for NARFE seals, officer pins and plaques;
- Maintains a file of *Quarterly News*;
- Reports members changes of address on Form F-31; and reports members' deaths on Form F-9. (In some chapters, this is done by the membership chair.)

TREASURER/FINANCIAL SECRETARY (Some large chapters choose to have, in addition to a treasurer, a financial secretary, usually given the duties starred [*] below.)

- Disburses funds as directed by the president, executive committee or bylaws, obtains IRS federal income tax exemption letter from the National Treasurer (see page 11, Communications/Mailing Permit);
- *Forwards to National Headquarters (attn: Budget & Finance) all national dues paid to the chapter and notifies National Headquarters of all chapter dues paid by members in order to update member records; (Uses Forms F-16 and F-16R *Transmittal Sheets* to send dues to National Headquarters. The instructions should be followed exactly.)
- If a chapter cashes a member's dues renewal check, sends a check for the national dues only to National Headquarters and indicates that the chapter has retained its dues.
- Receives chapter dues, which are reimbursed to the chapter by the following month for the prior month's chapter dues;
- Adds chapter dues certification on Form DW-2 for members requesting dues withholding;
- Deposits funds in a federally-insured financial institution and maintains an accurate, current account of all monies collected and disbursed;
- Reports chapter finances at each regular meeting (may use Form F-38, page 35, in the Attachments section; no copy is required at NARFE National Headquarters);
- Reconciles, at regular intervals, membership records and chapter dues received from the National Treasurer with the chapter secretary and the membership chair or other officer assigned membership duties;
- Uses requisition Form F-18 to request Forms F-37 and F-38 (*Treasurer's Monthly Report*), pages 34 and 35 in the Attachments section, from National Headquarters' supply section;
- Disburses special/dedicated (S/D) funds such as the NARFE-PAC fund, Alzheimer's Fund, Woodruff Building Fund, and the NARFE scholarship and disaster (NARFE/FEEA) fund as soon as possible after collection; separately accounts for and disburses all S/D funds, no matter their source or purpose, collected in the name of a chapter or federation or under color of their charters; Also records the receipt of all

S/D fund monies in the general journal; deposits those funds consisting of checks made payable to a chapter or federation, but meant for one of the S/D funds, along with related cash, in the chapter or federation checking account; draws a check on the chapter or federation account in an identical amount that is payable to the entity for whom the S/D funds are intended and forwards to that entity, along with any contributors' checks made directly payable to that organization. (Form F-38 should be used to report the S/D fund activity on the "Miscellaneous [itemized]" lines under both the "Receipts" and "Disbursements" sections of the form ensuring that there are no carry-over balances in these accounts because the funds are disbursed soon after collection.)

Form F-37 (a 3"x 5" card) can be used as:

- Treasurer's record card
- Secretary's master record of members
- Information for a telephone committee
- A prospect card
- Optional information as needed.

Forms F-37, *Chapter Record of Membership*, and F-38, *Treasurer's Monthly Report*, (pages 34 and 35 in the Attachments section) will be furnished by the National Headquarters supply office upon request (use Form F-18, *Requisition for Printed Supplies*).

Chapter presidents may appoint other officers and committees as needed. Some suggested officers and recommended duties are set out below.

Other Chapter Officers

PUBLIC RELATIONS OFFICER

- Chairs Public Relations Committee (if one is appointed) and carries out NARFE's public relations objective as outlined in the *Public Relations Handbook*, Form FH-9, which can be obtained by submitting Form F-18 to National Headquarters;
- Keeps *NARFE* magazine and, using local media, the community informed of chapter activities;
- Publicizes national and state legislative programs supported by NARFE;
- Provides the local press, television and radio with factual information about NARFE positions on current issues;
- Keeps chapter officers fully informed on issues affecting members;
- Coordinates with the program committee and chapter president in publicizing chapter visits by elected officials and candidates for public office, and other programs scheduled for chapter meetings.

Note: In some chapters, the public relations officer also serves as editor of the chapter newsletter.

SERVICE OFFICER (should be appointed in every chapter)

- Becomes familiar with the *Service Officer Guide*, FH-10, available from the National Headquarters supply section (see Form F-18, *Requisition for Printed Supplies*);
- Becomes knowledgeable about retirement and other member matters, such as:
 - a. Procedures governing delivery of annuity checks;
 - b. Life insurance and health benefits;

- c. Survivor benefits;
- d. Change of beneficiary procedures;
- e. Death benefits;
- f. State and federal income taxes;
- g. Social Security requirements;
- Helps members prepare reports and forms associated with such topics.

Service officers should also study benefits-related articles in *NARFE* magazine and *Quarterly News*.

CHAPLAIN

- Delivers or leads **non-sectarian** invocations at chapter meetings;
- Provides messages and counseling on appropriate occasions.

PARLIAMENTARIAN

- Becomes knowledgeable of *Robert's Rules of Order, Newly Revised*;
- Assists the chair in following correct procedures in conducting meetings, and advises the chair on points of order and questions before the chair;
- Advises the chair immediately of any error in proceedings that may adversely affect the substantive rights of any member, or otherwise do harm.

HISTORIAN

- Prepares and maintains an account of significant chapter activities during term of office (selected items from the minutes reported in less detail and all other substantial events);
- Upon the expiration of the historian's term of office, offers a clear account of chapter activities for approval as part of the chapter's official history;
- Combines the approved historical account with previous accounts, and passes the accumulated history to his/her successor or the chapter president.

RECORDS MANAGEMENT

Most chapters and federations lack a trained archivist or custodian of their records, yet, with care and attention to details, these groups function well. How they achieve this varies with the people involved and their ability to organize material, keep for specific time periods and purge records periodically.

Who keeps records and where these are stored influence the management process in many ways. Few individuals can devote much personal space to assorted boxes of files generated by individuals now inactive and possibly unknown to current officers. Yet, there should be an accepted system that assures that officers and committee chairs agree on the filing, retention and periodic disposition. (See Appendix A on page 26, Records Management and Quick Reference Chart.)

Election of Chapter Officers

Elections must be held as stipulated in the chapter constitution or bylaws. If there is a nominating committee, it must submit its recommendations at the meeting set by the constitution or bylaws or by the president, if there is no such provision. Note: The presiding officer must always provide ample opportunity for additional nominations from the floor.

New Officers

Many recommend that chapter elections be held at the same time of year throughout the Association. For example, officers installed in December, to serve from January 1 through the end of the one-, two- or three-year term of office set out in the chapter constitution or bylaws. Some chapter officers serve the same year—fiscal or calendar—that federation officers serve.

After election, outgoing officers should acquaint their successors with the duties and functions of their offices. At the close of a term of office, all official files, materials and supplies pertinent to an outgoing officer's function should be promptly turned over to the successor officer.

New officers should be installed with appropriate ceremony and in conformity with the bylaws. (See page 20.) Shortly after they have assumed office, the executive committee and all appointed officers should meet to discuss the chapter's functional needs and projects for the coming year.

Chapter Committees

NOMINATING

This committee may be appointed, or elected, as the constitution or bylaws provides. It should be established, and begin to function, well before the date set for elections, so that it will have sufficient time to: 1) analyze the actions of incumbent officers and needs of the chapter for the ensuing term; and 2) identify qualified and willing candidates. At the appropriate meeting, it should submit a nominee or nominees for each elective office.

EXECUTIVE

This committee generally consists of the elected officers and members, and may include the immediate past president to provide program continuity. It should meet regularly to formulate programs and approve any business to be presented to the membership for its consideration. This committee is one of the most effective means of formulating chapter plans and supporting activities. Some chapters elect one or two additional members to serve on this committee.

MEMBERSHIP

This committee is responsible for developing a membership plan for recruiting eligible retirees, their spouses and survivors, and current federal employees and their spouses, to join NARFE.

Discussion points may include: goals and objectives, desired outcomes, specific successful efforts from the chapter experience, volunteers needed for assignments, money needed and inclusion in the budget, and follow-up system for tasks assigned.

An effective chapter plan provides a glimpse of the future that points in the right direction for events occurring next week, in a few months or even a year. Where a chapter has been and how it has changed is critical. By reviewing this past, chapter leaders can determine what worked and what did not. Before you start designing a

Membership Plan

This plan will help keep score, set goals and measure progress. Such a history can guide chapter leaders in avoiding repetitive mistakes.

plan, determine if one exists or has in the past. Such a plan may be as simple or detailed as the chapter leadership chooses. Whatever its appearance, a truly effective plan is written and is linked to the annual budget. Irrespective of size or location, no chapter is too small or too large that it can ignore the necessity of a membership plan.

As with any effort, getting started may be difficult. A blank page can be intimidating, especially to one person working alone. Dependent upon chapter size and meeting location, perhaps the best resource is a working group of the membership committee plus some of the chapter officers.

With the membership committee chair presiding, a free and open discussion can produce many ideas that will require reflection and later clarification. Do encourage brainstorming in which all proposals are welcome, but ensure that someone takes notes.

See Appendix C on page 30 for a suggested membership action plan. Your chapter plan may vary, dependent upon chapter resources and opportunities.

Each chapter is assigned specific ZIP codes. The ZIP codes make up that chapter's logistic support area (LSA). Assignment or movement of ZIP codes is the responsibility of the federation president. NARFE mails each chapter an M-114 report twice a year (April and October). This report lists, in separate categories, all chapter members and non chapter members assigned to the chapter's LSA. The M-114 may be obtained from NARFE's Web site.

Tracking of chapter and non-member changes are accomplished with *Chapter Activity Report* M-112. This report is produced monthly; two copies are sent to each chapter president, who is responsible for assuring that they are given to the chapter officers or committee chairs who need them. At least one copy should be made available to the chapter's membership chair. The M-112 may be obtained from NARFE's Web site. This report is invaluable in keeping abreast of membership activity and, in particular, for focusing on those members who fail to pay their dues. It is a very helpful retention tool.

The committee should actively solicit both national-only members and potential new members in its LSA via telephone, letter or other means to join the chapter. Committee members should be well-equipped with materials and supplies to inform and acquaint potential members with the advantages of joining NARFE, and should have application blanks available at all times. Questions about membership recruitment and retention and pre-retirement seminars should be directed to the National Headquarters' Membership Recruitment & Retention section on 1-800-627-3394.

Note: If a public relations committee is not appointed, the membership committee should be responsible for publicizing NARFE and chapter activities.

LEGISLATIVE

This committee is charged with informing chapter members of proposed local, state, and national legislation and regulations that may affect federal civilian retirees, spouses and survivors. Under the guidance and direction of the National Headquarters Legislative Department, it should direct campaigns to: 1) influence and expedite favorable legislation and regulations; and 2) oppose and defeat unfavorable legislation and regulations. The committee should report to chapter members, federation officers and national officials on favorable or unfavorable progress or developments as they occur.

PUBLIC RELATIONS

This committee is appointed to help the public relations officer, who should be its chair. The FH-9 *Public Relations Handbook*, available from the National Headquarters supply section (see form F-18, *Requisition for Printed Supplies*), provides professional advice on relations with the media, Congress, the local community, etc.

PROGRAM

This committee plans and presents at each regular meeting at least one feature, which keeps it from being solely a business meeting. This helps stimulate and maintain a high level of interest and attendance at chapter meetings. Suggestions: a talk by an elected governmental official or candidate; a medical or health practitioner; a representative of the financial or insurance industry; discussion of wills, taxes, trusts, powers of attorney, etc. by a banker or attorney; historical presentations; travel films from the public library; an art show, or entertainment from a local theater group or school.

In inviting politicians to speak, chapters must remember that NARFE is a political, but **non-partisan**, organization. Incumbent elected officials may be invited to speak without regard to political party affiliation, but should be instructed to speak only as office-holders, not as candidates.

If, during an election campaign, a non-incumbent candidate is invited to speak, then all other candidates for the same office should be invited to speak. During election campaigns, “speak offs” among candidates are good ways to stimulate member interest and attendance.

SUNSHINE

This committee maintains contact with and helps chapter members who are ill or otherwise confined, coordinating with the service officer on occasions affecting a member or the member’s family. It should commemorate anniversaries, birthdays, achievements, etc.

SOCIAL

This committee schedules and oversees occasional picnics, special dinners, happy hours, fellowship circles or other group activities. Such activities promote fellowship and members’ interest, and are an integral part of a good membership retention program.

TELEPHONE

This committee contacts members about regular and special meetings, relays information on legislative developments, reminds members about renewing their memberships, and responds to other needs. It should apportion duties so that no one committee member is overburdened. The chair should inform the sunshine committee of any member’s illness or other problem detected during telephone contacts.

AUDITING

This committee makes an annual chapter fiscal year audit of the treasurer’s records and chapter funds. Its report should go to the president and executive committee and be reported on at a chapter meeting. If an audit reflects any discrepancy, the executive committee (minus the treasurer) should determine the cause, and correct it.

WAYS AND MEANS

This committee initiates programs to raise funds for: 1) delegate expenses for federation and national conventions; 2) charitable contributions; 3) scholarship awards; 4) social functions; and, 5) other chapter projects not included in accountable yearly income.

OPERATIONS

When these several committees are staffed and functioning, chapter leaders will want to determine if chapter resources are being used most effectively. This is seldom easy or simple, but we must consider if chapter members as volunteers are engaged in activities that meet the most critical chapter priorities.

A checklist is in Appendix C on page 30 for chapter leaders' guidance as they compare goals with activity. These are suggested as a tool by which leaders determine if their allocation of resources meets their objectives.

Chapter Meetings

Monthly meetings are highly recommended. Chapters normally have a fixed meeting site. However, the membership should be notified in ample time of any change by a notice published in the chapter newsletter or contact by the telephone committee.

A United States flag is to be properly displayed at each meeting. The chapter's NARFE banner should also be displayed if one is available (see page 23 for instructions on how to obtain a NARFE banner).

Unless otherwise provided in the chapter bylaws, this is a suggested order of business:

1. Invocation or moment of silence;
2. Pledge of Allegiance;
3. Introduction: new members/guests;
4. Minutes of previous meeting;
5. Officer reports;
6. Committee reports;
7. Unfinished business;
8. New business;
9. Announcements;
10. Program;
11. Benediction;
12. Adjournment.

Note: Always follow the rule "God and Country"

Some chapters confuse which of these two should come first. Following the rule of thumb "God and Country," the invocation or a moment of silence always precedes the pledge. The president or the members may alter the order of business for a specific meeting to meet special circumstances; for example, if the guest speaker has to leave early.

Communications

CHAPTER NEWSLETTER

A chapter newsletter is the most effective means for disseminating chapter information. It is particularly useful to members who are unable to attend meetings regularly, and to organizations that publicize chapter affairs. The newsletter should include all chapter announcements.

A good chapter newsletter should be neat and orderly in appearance, making members want to read it. An effective chapter newsletter includes a mix of chapter social news (birthdays, anniversaries, etc.), chapter and federation business news (awards, membership, state and local legislation and events, Alzheimer's and NARFE-PAC), and national NARFE news (legislation, membership, fund-raising, etc.).

NARFE National Headquarters publications should be used as information sources for newsletters. One of the purposes of these publications is to provide information for chapter newsletters and chapter meetings. Publications are *Recruiter's Journal and Quarterly* and *Quarterly News*.

Responsibility for a newsletter is a high burden for one person. Members with experience in editing or writing should be asked to help. In large chapters, a committee can fulfill this function.

In some chapters, the public relations committee chair edits the chapter newsletter. In any event, the newsletter editor should work closely with all officers and committee chairs.

STATIONERY

Official chapter stationery adds weight to correspondence. Letterhead designed for chapters is available from National Headquarters (see Form F-18).

NOTE STATIONERY

Available through Procurement at National Headquarters.

MAILING PERMIT

NARFE is a nonprofit organization; chapters and federations may obtain a third-class, nonprofit bulk mailing permit for 200 copies or more of any item, including the newsletter. A chapter that wants a permit should ask the National Treasurer for a copy of the June 22, 1970, IRS letter granting nonprofit status under the Internal Revenue Code. The local main post office will provide necessary forms and instructions, and will require a copy of the IRS letter. Ask for postal system domestic mail manual rules at the post office to learn permissible uses. Penalties are severe for using the permit for a profit-making organization's purposes.

DISTRIBUTION CODE

An alpha distribution code, based on the computer system numeric codes, has been adopted, so that federation and chapter officers will know to which other officers National Headquarters-originated mailings have been sent. (See code on next page.)

National Office Distribution Code Printed Matter

Set out below is the alpha code showing to which field officers, in addition to addressees, if any, headquarters-originated correspondence, periodicals, memoranda, etc., are distributed.

The alpha codes employ the numeric codes used in the computer system.

A 01.20,37, 43, 49, 50, 51	N 20, 36, 49, 50
B Code A plus: 21, 22, 34, 39	O All numeric codes
C Code A plus 03, 05, 23, 25	P Code B plus 08, 29, 30
D Code A plus 04, 05, 14, 24, 25	R 20, 40, 49, 50
L Code A plus 06, 26, 27	S Code B plus 09, 10, 31, 32
M Code B plus 07, 33	Z Code B plus 12, 35

01 Chap Pres	16 NARFE Net Coord.	33 Fed'n Memb Chair
02 Chap VP and Exec VP	17 Chap Legis Ch/State	34 Fed'n Editor
03 Chap Sec'y	20 Federation Pres	35 Fed'n Alzh Chair
04 Chap Treas	21 Fed'n Exec VP	36 Fed'n NARFE/PAC Chair
05 Chap Sec'y-treas	22 Fed'n V Pres	37 Fed'n Imm Past Pres
06 Chap Legis Chair/Natl	23 Fed'n Sec'y	38 Fed'n Other
07 Chap Memb Chair	24 Fed'n Treas	39 Fed'n Exec Cmte
08 Chap Pub Rel	25 Fed'n Sec'y-treas	40 Fed'n Preret Sem
09 Chap Serv Off	26 Fed'n Legis Ch/Fed'l	41 Fed'n Bldg. Coord.
10 Chap Serv Cmte	27 Fed'n Legis Cmte/Fed'l	42 FEEA Coord.
11 Chap Editor	28 Fed'n Legis Ch/State	43 Fed'n Dist Off
12 Chap Alzh Chair	29 Fed'n Pub Rel	49 Regional Vice President
13 Chap NARFE/PAC Chair	30 Fed'n Pub Rel Cmte	50 Resident National Officer
14 Chap Fin Sec'y	31 Fed'n Serv Off	51 Past National Officer
15 Chap Other	32 Fed'n Serv Cmte	

NARFE Service Center Clearinghouse

This function oversees the Retiree Service Center Advisory Program. It gives administrative support to facilities provided by an installation, municipal center, federal building or private entity. NARFE volunteers help local federal civil service annuitants (whether or not NARFE members) in matters relating to: death benefit claims, civil service retirement, survivor benefits, life insurance and annuity rates, Medicare, nonreceipt of annuity payments, Federal Employee Health Benefits Program (FEHBP) pamphlet requests, minor FEHBP problems, and the myriad other matters critically important to annuitants. All contacts are confidential; volunteers are not authorized to advise or help current employees or their dependents. Volunteer expenses related to service center duties qualify for federation 10 percent fund reimbursement.

Guidance furnished through the clearinghouse includes: 1) a pre-retirement counseling handbook, 2) a training manual, 3) copies of representative administrative support agreements, and 4) selected service publications. We encourage chapter sponsorship and participation for establishing and operating Service Centers. Requests for information and help should be sent to the National Headquarters Retirement Benefits section.

Section II: Federation Officers & Operations

Federation Officer Duties

GENERAL RESPONSIBILITIES

- Promote the aims and objectives of NARFE;
- Become familiar with the National Bylaws (FH-4) and the federation constitution and bylaws;
- Initiate and help organize new chapters wherever needed (see page 16), and help each new chapter become an effective and independent operating group;
- Serve as liaison in helping National Headquarters and Regional Vice Presidents identify, analyze and resolve chapter problems;
- Revive and strengthen faltering or inactive chapters, and help all chapters solicit new members;
- Attend federation meetings and conventions, and district and chapter meetings in accordance with federation bylaws;
- Implement the policies and programs of the National Executive Board as administered by National Headquarters and Regional Vice Presidents.

The duties below are set out principally as guides. Federation constitutions and bylaws vary in duties specified and should be followed.

PRESIDENT

- Acts as the chief executive and director of federation activities and discharges the duties required by the federation constitution and bylaws;
- Presides at federation meetings and conventions and meetings of the federation executive board;
- Appoints officers and committee chairs and members that are not required by the constitution or bylaws, but are necessary to carry out the functions of the federation;
- Assigns ZIP codes for each chapter in the federation, using form F-46;
- Signs all checks drawn on federation funds, subject to the restrictions set by the executive board or federation bylaws;
- When required, signs all acts and proceedings of the federation;
- Ensures that all federation reports are promptly made and sent to National Headquarters Federation & Chapter Services section or Regional Vice Presidents;
- Ensures that the federation secretary reports all federation officers and changes in officers to National Headquarters on Form F-7A, *Federation Officer Roster*.

FIRST VICE PRESIDENT

- Performs duties assigned by the president, and presides over federation meetings in the president's absence;
- Performs presidential functions if the office of the president is vacant, until the vacancy is filled.

SECOND VICE PRESIDENT

- Performs all duties assigned by the president and presides over federation meetings in the absence of the president and first vice president.

SECRETARY

- Records minutes of all proceedings and maintains records of the federation, its Executive Board, and conventions;
- Furnishes the National Headquarters Federation & Chapter Services section an up-to-date Form F-7A, *Federation Officer Roster*, for each change in federation office;
- Completes Form F-22, *Federation Convention Report*, immediately after a federation convention and promptly sends it, with attachments, to National Headquarters' Federation & Chapter Services section;
- Requisitions (on Form F-18) and maintains supplies of NARFE forms and performs all duties the president assigns.

TREASURER

- Receives and has custody of all federation funds; if the treasurer does not have the IRS Federal Income Tax Exemption Letter, it can be obtained from the National Treasurer;
- Keeps accurate, current records of all federation funds received and paid out;
- Deposits funds in a federally-insured financial institution with Executive Board approval, or as specified in the bylaws;
- Draws checks against federation funds as authorized by the Executive Board or federation bylaws;
- Submits a full financial report at each federation convention, but no less than annually; a copy should be sent to the National Treasurer;
- Performs other duties as assigned by the president.

DISTRICT OFFICERS

Each district officer (area vice president, district vice president, etc.) should become aware of, and familiar with, the problems and needs of each chapter in his or her district or area, and help resolve problems and fill needs. The district officer should consult other federation officers and the Regional Vice President to help achieve established goals.

Each district officer should use requisition Form F-18 to order supplies needed to reactivate inactive chapters, organize new ones and recruit new members. National Headquarters' Federation & Chapter Services section will send a new chapter kit to the organizing group. For recruiting, the district officer should use computer printouts sent to federation and chapter presidents on a regular basis by National Headquarters' Federation & Chapter Services. New members should be referred to appropriate chapters. Chapter membership committees should be asked to follow up on all prospects.

NOTE: The federation executive board should define the boundaries of each district, based on population and geographic areas.

The district officer should periodically visit each chapter in the district, and should organize and chair periodic meetings of chapter officers for training and discussing problems.

Note: The federation executive board should define the boundaries of each district, based on population, and legislative and geographic areas.

Organizing a New Chapter

A minimum of five NARFE members, or eligible members, in cooperation with the federation president, may apply to form a new chapter. Non-members who wish to be charter members must join NARFE no later than the date of the charter application. The minimum is five, but every effort should be made to enlist a higher number of charter members.

The group wishing to file for a charter must apply through the federation president. NARFE has over 1,500 chapters, and there

may be an active chapter nearby. The federation president will determine whether or not forming a new chapter in the area would be to NARFE's advantage and able to promote total NARFE membership. The federation president decides which ZIP codes are assigned to the new chapter.

If the president decides that the new chapter would be advantageous, he or she should arrange a personal contact by a federation district officer or other representative to help and provide the forms needed; a new chapter kit is available from the National Headquarters' Federation & Chapter Services section.

The federation representative should help: a) in local contacts with prospective members among known federal retirees, NARFE members and those still employed as well as their spouses; and b) set an organizing meeting to elect officers and help fill out and submit charter application forms.

Essential officers for a chapter are president, secretary, and treasurer or secretary/treasurer if a combined office is preferred. There will be funds to handle. Subsequent formal elections should be held in accordance with the approved constitution and bylaws.

The federation representative should help the secretary or secretary/treasurer in collecting dues, both national and chapter, and in remitting all national and chapter dues to National Headquarters with Form F-16 or Form-F16R. The National Treasurer's office will return to the chapter a \$2 recruitment fee, by the middle of the following month, of the first year's national dues of a new member recruited by the chapter .

In organizing a new chapter, consideration must be given to whether or not the new chapter has the depth of membership to fill essential chapter offices not only immediately, but in the future. Too much work goes into establishing a new chapter to find, a few years later, that there aren't enough members interested in serving as officers to permit the chapter to continue.

On receipt of the initial organization papers, the National Headquarters' Federation & Chapter Services section will assign a chapter number to the chapter. Before a charter can be

Questions relating to ZIP code assignments and chapter Logistic Support Area (LSA) should be sent to National Headquarters Federation & Chapter Services section. Assignment of ZIP codes to a chapter's LSA is the responsibility of the federation president.

issued, the chapter must have furnished to Federation & Chapter Services section:

- A *Charter Application*, Form F-19, listing the charter applicants and the ZIP codes authorized by the federation president;
- A Form F-7 roster, with each officer's name, address and telephone number, meeting place and time, and annual dues amount;
- Transmittal sheet Forms F-16 and F-16R with all membership applications and renewals and checks for all national and chapter dues;*
- A chapter constitution and chapter bylaws, Form F-21, signed and dated by the chapter secretary for final approval at National Headquarters.

Charter issuance can be delayed 60 to 90 days to allow as many charter members as possible.

Closing a Chapter

A chapter will be closed or merged with another chapter by National Headquarters solely on the federation president's recommendation, and only after the federation president has taken all steps to revive it, and only after consulting with any remaining officers of the chapter being closed. Obligations of the chapter should be paid as they come due. The funds the chapter votes to disburse to a chapter with which they may be merging, or to chapters receiving members being reassigned must be completed before the chapter closes. Funds should be retained to pay any obligation known to be due, but payable later. Any remaining funds in the chapter treasury must be sent to the National Treasurer to be placed in escrow in case the chapter is reactivated in the future. After a period of five years the monies will be returned to the Federation of record for new chapter organization. The charter shall be sent to the National Headquarters Federation & Chapter Services section. The federation president must reassign the chapter's ZIP codes to another chapter, or chapters, on Form F-46, which should be sent to Federation & Chapter Services. The federation president must also submit a list indicating to which chapter(s) each member is being transferred.

Reactivating a Closed Chapter

To reactivate a closed chapter, the federation president should write to the National Headquarters' Federation & Chapter Services section asking that the chapter be reactivated. The original charter may be used, if still available, or it can be reconstructed** if records are sufficient. A new charter can be issued, showing current officers and new charter members, using either the old charter number or a new number.

The National Treasurer will determine whether or not any money belonging to the closed

*After receipt of the charter (listing charter members and elected officers): a) forms F-16 and F-16R with membership applications and renewals and the proper dues, should be sent to the dues receiving section; and b) the chapter secretary (secretary/treasurer) should process the form SS-4, application for a nonprofit organization identification number, furnished with the welcoming letter.

**Any chapter that has lost its original charter may obtain a reconstructed charter from the National Headquarters Federation & Chapter Services section.

chapter is in escrow, and if so, send it to the treasurer of the reactivated chapter.

Before the reactivated chapter's charter is issued or reconstructed, the chapter must have sent to National Headquarters' Federation & Chapter Services section:

- A Form F-19 *Charter Application*, listing the ZIP codes assigned by the federation president;
- A *Chapter Officer Roster*, Form F-7, giving the name, membership number, address and telephone number of each officer and committee chair, meeting time and place, and annual dues amount;
- One completed copy of the proposed chapter constitution and bylaws, Form F-21, signed and dated by the secretary or secretary/treasurer;
- Transmittal sheets Forms F-16 and F-16R, accompanied by all membership applications and membership renewals, together with the proper dues amount for combined national and chapter dues (\$2 recruitment fee of each new national member's national dues will be rebated to the chapter that recruited the member).

If the chapter wishes, National Headquarters will, as for a new chapter, withhold the charter for 60 to 90 days to permit the maximum number of charter members to be obtained.

Section III: Other Information

Installation of Officers

We suggest that the officer conducting the installation of federation officers be a National Resident Officer, the Regional Vice President, the outgoing federation president or the immediate past federation president. The officer conducting installation of chapter officers should be a federation, district or other officer, the outgoing chapter president, the immediate past chapter president, a National Resident Officer or Regional Vice President.

The installation ceremony should be as follows:

Installation of Officers

Presiding Officer: Will the officers-elect please raise their right hands?

Do each of you hereby sincerely promise and pledge on your honor to efficiently perform the duties of your office, to faithfully carry out the programs, policies and bylaws of the National Active and Retired Federal Employees Association, to be loyal to its goals and objectives, and to work as a team in harmony with the Association's leadership?

Further, that you will properly safeguard all books, papers and other property of the Association which may come into your possession while in office; that you agree to make available for inspection by proper officials of the Association, upon reasonable notice and request, all such books and records; and you will deliver them intact to your successor in office at the close of your official term?

Officers in unison: I do.

Presiding Officer: I declare you duly installed officers of the _____ Chapter/Federation. You will now assume the duties of your respective office as prescribed by the bylaws.

The newly elected president should be presented with a president's pin or button, and the outgoing president should be presented with a past president's pin or button. The expense of these pins should be borne by the chapter or federation. Use the NARFE•Mart order form.

National Conventions

TIME AND PLACE

National Conventions are held biennially in even-numbered years. These conventions are the primary means through which members influence NARFE policy and procedures. Delegates at the convention held four years earlier select the convention location from among several cities proposed.

REPRESENTATION

Each chapter is entitled to one delegate for every 50 voting members or fraction thereof. A chapter with 50 or fewer members is entitled to one vote; a chapter with 51-99 members is entitled to two votes, etc. The chapter delegation may cast as many votes as the number of delegates to which the chapter is entitled.

Each National Resident Officer, Regional Vice President and federation president is a delegate-at-large and has one vote. If a federation president cannot serve, any federation officer, in order of succession, shall serve as the delegate-at-large and cast the federation vote.

In late April or early May of the convention year, National Headquarters will provide a packet of convention materials to each chapter president. This material verifies the number of chapter members and the authorized voting strength. It also includes forms to identify how the chapter will be represented. A chapter may choose (1) to send delegates, of whom one will be designated as the Voting Representative, or (2) to ask another chapter to represent it through proxy. Other chapter members may attend as alternate delegates and be available to fill any vacancies that occur.

National Officers and convention sites are selected and money issues decided through the written ballot process, whereas Regional Vice Presidents are chosen at the regional caucuses.

Proxy forms are issued by the National Secretary. A delegate or delegate-at-large from the same federation may serve as a proxy, but may not serve as a proxy for more than three chapters.

A chapter president and secretary will coordinate identifying delegates and alternates and then submit their names to HQ. All persons attending the convention are encouraged to register early and submit banquet reservations as a group so chapter members may be seated at the same table.

DELEGATE ROLE AND EXPENSES

Before the convention, it is important that delegates read the convention resolutions and review their knowledge of parliamentary procedures. They should note what action a federation took on a resolution. If none is shown, it indicates the resolution was submitted directly to HQ. At the National Convention, delegates should listen carefully to the report from the committee having jurisdiction over specific resolutions.

At the convention site, all delegates and guests must obtain their registration package and credentials, if designated to cast their chapter or a proxy vote. It is imperative that a voting certificate is kept in a safe place so it is not lost.

A delegate may vote in either one of two ways. First, as the chapter Voting Representative or if carrying another chapter's proxy, a delegate casts a written ballot for these chapters. Second, all delegates participate in the voice or floor votes taken on the recommendations about the resolutions considered by the convention committees.

HQ will provide detailed instructions and forms when specific actions are appropriate.

If at all possible, delegate expenses should be paid by the federation or the chapter. If a federation or chapter does not budget for all or part of such expenses, it could authorize some form of fund raising for this purpose. In the absence of federation or chapter funds, convention expenses must be paid by the delegate.

A delegate selected for a committee that meets before the convention opens will receive per diem from HQ to defray the additional housing costs.

SESSIONS, ROOMS, BANQUET

National Conventions meet in morning and afternoon sessions, Monday through Thursday, formally closing at a banquet on Thursday evening. Room reservation forms are published in *NARFE* magazine, beginning with the January issue of the convention year. Other convention details and banquet reservation forms are published in subsequent issues as they develop.

CONVENTION RESOLUTIONS

Chapters may propose Bylaw amendments or convention resolutions that change how NARFE functions either through a federation convention or directly to the National Secretary's office at Headquarters.

All proposed Bylaw amendments or convention resolutions must either be on the Form F-3A or sent by e-mail through the Federation Secretary on the NARFE Web site.

Headquarters will set the deadline for submission; this allows time for review, printing and the mailing of the booklet to chapter secretaries and delegates. Dates for deadlines will appear in NARFE's monthly magazine in the national convention year.

Awards

CITATION FOR DISTINGUISHED SERVICE

Distinguished service certificates, bearing an embossed NARFE seal and red accent ribbon, may be requested from Federation & Chapter Services, at no cost, in five signature types: 1) Chapter President, 2) Federation President, 3) Regional Vice President, 4) National President, or 5) Regional Vice President and National President. The recipient's name will be printed in large type. Blank certificates for 1), 2) and 3) are available. For certificates 1), 2), and 3), the service to be recognized should have had an appropriate region-wide, federation-wide or chapter-wide effect. For certificates 4) and 5), requests must be written and the service to be recognized must have had a noteworthy effect on a national program. The signing officer is the judge of the merits.

All certificates, printed or blank, have the embossed gold NARFE seal and red accent ribbon before going to the National President for signature, or before mailing to the signing field officer.

CHAPTER ANNIVERSARY CERTIFICATES

Chapter anniversary certificates, signed by the National President and appropriate Regional Vice President, may be ordered through National Headquarters' Federation & Chapter Services. Federation & Chapter Services will research and verify anniversary dates and total years of continuous active operation.

PLAQUES

For information on plaques honoring individuals, use the NARFE•Mart order form or contact Marketing/Meeting Planning at National Headquarters.

Obtaining a NARFE Banner

The standard NARFE banner measures 36 inches wide by 50 inches high. The banner will be white with the logo and copy in red and blue.

The chapter name and number appear across the top of the banner and National Active and Retired Federal Employees Association is printed in four lines across the bottom of the banner.

The base price of the banner is \$122 which includes a) a combination of up to 13 letters and digits to identify the chapter; b) a cord and tassel; c) a hanging rod and standard ground UPS charges. Additional letters/digits over the 13 allowed will be charged at a cost of \$3 each.

A carrying case is available for an additional \$25.

Make the check payable to National Capital Flag Co., Inc., and send the order to:

National Capital Flag Co., Inc.
100 South Quaker Lane
Alexandria, VA 22314

Banners are shipped directly to the chapter from the manufacturer. If you have any questions or complaints, you can write to the above address, call 1-800-368-3524, (Washington, DC, area 703-751-2411), or send an e-mail to aulmer@natlcapflag.com. You can visit their Web site at www.natlcapflag.com.

Appendices

Appendix A - Records Management

Quick Reference Chart



A record of what an organization, be it chapter or federation, has done can be as important as the event and its aftermath. Decisions to repeat an event will depend perhaps on whether the outcome proved helpful. But if there are different decision-makers now, who did not know their predecessors, a record of these events can be critical. Thus some records that describe the purpose, conditions, people, and other factors pertinent to an event are critical to any NARFE activity.

Most chapters and federations lack a trained archivist or custodian of their records; yet, with care and attention to details, these groups function well. How they achieve this varies with the people involved and their ability to organize material, keep for specific time periods and purge periodically.

Few bylaws provide guidance on what and how records ought to be maintained. Even where they do, the primary rule should be the needs and resources of an organization to amass, retain and reduce its records as appropriate. Who keeps these records and where they are stored influence the record-management process in many ways.

Not many individuals can devote personal space to assorted boxes of files currently generated plus those of individuals possibly now inactive and unknown to current officers and committee members. Yet there should be an accepted method that assures that officers and committee chairs systematically file, retain and periodically reduce their records.

Over the years, a few dedicated individuals have advocated records management training, which has produced both excellent guidelines and informed chapter members. This section reflects in part their fine work. Although variations exist, current practices indicate general acceptance in NARFE that records can be divided into three categories—One Year Files, Three-Year Files and Permanent Records.

	FILE TYPE	MAINTENANCE PERIOD	COMMENTS
PERMANENT RECORDS	<ul style="list-style-type: none"> •EIN – Employer Identification Number •Minutes and Committee Reports •Organizational background papers (charter, constitution & bylaws, officers rosters) •Photographs, newsletters, news clippings, audio/visual cassettes for historical purposes (or archives) •Property Records (accountable property) audit reports, budget and journal •Record of chapter property (flag, banner, gavel, postal permit, etc.) •Directory of Chapters* •Equipment Inventory ** •NARFE Manuals and Handbooks *** 	<p>Permanent</p> <p>*Until superseded **As long as equipment is retained ***Until revised or superseded</p>	
THREE YEAR FILES	<p>Financial Records: Bank statements (investment accts., money fund accts., Treasury Bills, CDs, etc.) Checkbooks, cancelled checks and bank reconciliations Daily cash receipts and bank deposit Invoices, reports, vouchers Per Capita report file Receipts and Disbursements Ledger</p>	<p>Three years preceding the current fiscal/ calendar year</p>	<p>The IRS Form 990 Organization Exempt from Income Tax page 14 subtitle Record Keeping. "Usually records that support an item of income, deduction, or credit must be kept for 3 years from the date the return is due or filed, whichever is later. Keep records that verify the organization's basis in property for as long as they are needed to figure the basis of the original or replacement property. The organization should also keep copies of any returns it has filed. They help in preparing future returns and in filing an amended return."</p>
ONE YEAR FILES	<p>NARFE Publications (<i>Quarterly News, Recruiters Journal and Quarterly</i>, etc.) and general correspondence</p>	<p>Previous year and the current fiscal/ calendar year</p>	<p>Correspondence should be destroyed unless containing historical information</p>
COMMITTEE RECORDS	<p>File folders</p>	<p>Two years then screened for disposal of non-essential material prior to turning over to the incoming chair-person</p>	<p>File folder labels should indicate: Subject, calendar/fiscal year and disposition instructions (one year, three year or permanent)</p> <p>Normally, the contents of a file folder should not exceed one and one half inches</p>

Appendix B - Checklist of Chapter Operations

1. Organization

Comments

Staff committees by priority of must do, can and desirable actions

- Select able and interested members
- Assure each chair has records, needed publications from predecessor

Legislative objectives publicized and supported

- Formulate plan to cover "hot" issues at each meeting
- Educate members about rationale of issues and action needed
- Initiate periodic letter-writing at chapter meetings
- Communicate regularly with legislators, visit, invite and attend public meetings
- Acknowledge legislators' positive efforts, support NARFE friends, NARFE-PAC, and vote

Membership program plan

- Recruit actively in community organizations
- Participate in health fairs, pre-retirement seminars and conventions
- Retain and regain members dropped for non-payment of dues
- Stress Dues Withholding and Life Membership programs
- Reports: Submit F-7 annually or after officer change. Review and act on monthly M-112 data and Semi-Annual M-114 roster

Service to members

- Assist survivors
- Answer questions on retirement, FEHBP, FEGLI, Social Security and Medicare
- Explain benefit changes for retirees/survivors as in Long-Term Care
- Warn members about new spouse's survivor elections and FEHBP coverage
- Work with Service Centers and Retirement Benefits Service Department on benefits problems
- Encourage computer use of retirement and insurance on www.narfe.org and to other helpful Web site links

Newsletter preparation, printing and distribution

- Produce, distribute chapter publication monthly or as often as possible
- Include committee chairs report of current information on critical issues: legislation, membership status, program and other issues
- Assist smaller chapters write, compose, print or mail if centralized services are appropriate

2. Use of Resources

Comments

Plan dues that are realistic, timely and adequate for chapter objectives

- Monitor dues payments to ensure renewals and regain members dropped for nonpayment of dues
- Raise charitable funds for specific purposes
- Share in federation and national funding for special programs

3. Chapter meetings

Based on member needs and interests
Select speakers responsive to expressed interests

- Meet and greet newcomers by Hospitality Committee
- Keep people coming back by learning of needs and interests
- Sign up guests as members early

4. Outreach to community

Train members to look within their other community affiliations for potential NARFE members
Participate as a NARFE entity in local civic events

5. Dealing with federal agencies

Contact Human Resources or Personnel Officer for access to retirement planning events
Follow up on federation leads from a Federal Executive Board

6. Convention participation

Chapter meetings during year
 Discuss subjects of chapter interest and draft resolutions
 Encourage convention attendance

Pre-convention meetings
 Prepare members for committee participation and speaking on resolutions

Provide some finances for delegates at federation and National Conventions
Nominate delegates to specific committees

Appendix C - Membership Action Plan

INTRODUCTION

The following Membership Action Plan was developed by a chapter and is provided for your use. This Plan was prepared by a three-person committee—chapter membership chair, chapter president, and the past president. A draft plan was reviewed and refined by the Chapter Executive Board. Then it was presented to chapter members for additions and revisions before approval at a chapter meeting.

The plan that your chapter develops can vary from this example depending upon the resources and opportunities available. Simplicity may be the preferred choice, but any plan ought to have as much information as needed to guide participants toward completion. Yet, it should enable a member to determine if another task could be addressed while waiting for an earlier task to be completed. The target dates are suggested only. Some action items are completed through group or individual assignments.

MEMBERSHIP ACTION PLAN

GOALS – To develop a Chapter Membership Plan that will assist in achieving the following objectives:

1. Recruit new members
2. Retain current members
3. Increase meeting attendance
4. Involve maximum number of members in achieving specific actions listed in the plan
5. Maintain a record of each action, prepare a budget, and account for expenses
6. Prepare status reports for meetings and newsletters.

OUTLINE OF THE PLAN

	ACTION BY	TARGET DATE
1. RECRUIT NEW MEMBERS		
A. Make a list of federal agencies or services and contact them	Chair and area callers	Month #1
● US Dept of ———		
● US Dept of ———		
● US Postal Service		
● DOD		
● Others		
B. Distribute NARFE posters, recruiting literature and other information	Area callers	Month #1
● Federal agencies		
● Libraries		
● Markets		

	<ul style="list-style-type: none"> ● Post offices ● Senior centers ● Fairs 		
C. Increase publicity		Member #1	Month #3
	<ul style="list-style-type: none"> ● Newspaper ads, articles, letters to the editor, notices of meetings ● Local radio ● Public television ● Service announcements ● Telephone directories ● Join Chamber of Commerce or other local groups 		
D. Make personal contacts		All members	Month #4
	<ul style="list-style-type: none"> ● Talk to neighbors, friends, ● Families, senior organizations 		Ongoing
E. Incentives		Executive Board	Month #4
	<ul style="list-style-type: none"> ● Rebates ● Chapter dues reductions ● Cash awards for top recruiter ● Multi-year for current employees ● Gift memberships 		Ongoing
F. Make phone calls		Member #2	When recruited
	<ul style="list-style-type: none"> Develop caller outline Assign portion of calls to committee members 		
G. Send welcome to new members		Members #3	When recruited

2. **RETAIN EXISTING MEMBERS, REGAIN LAPSED MEMBERS**

- | | | |
|---|-------------------|---------|
| A. Review M112 and M114 reports to identify anniversary dates, second notices, reinstatements, three months in arrears, dropped for non-payment of dues | Members #3, 4 & 5 | Monthly |
| B. Make phone calls, answer questions resolve problems, stress benefits, arrange transportation | Member #3 | Monthly |
| C. Write personal letters, enclose survey form and self-addressed return envelope, and dues withholding form when necessary | | |
| 1. Action performed by specific member(s) | | |
| 2. Date action to be completed | | |
| 3. Reports, publications necessary for the goal | | |

3. INCREASE ATTENDANCE AT CHAPTER MEETINGS

A. Review M114 form to identify members in good standing that do not come to meetings		Months #4,5 & 6
B. Make phone calls, answer questions, resolve problems, repeat benefits and arrange transportation	Area callers	Month #2
C. Write personal letters, and survey form with self-addressed return envelope, when necessary	Member #3	Months #4 & 10
D. Obtain volunteer greeter for Chapter meetings	Member #4	Month #1
E. Add humor to enliven meetings	Member #4	Month #1

4. INVOLVE MAXIMUM NUMBER OF CHAPTER MEMBERS IN ACTION PLAN

Obtain additional volunteers at Plan presentation meetings and follow up personal contacts. Enter names in Plan		Months #1,2 & 3
--	--	-----------------

5. MAINTAIN LOGS OF ACTIONS, PREPARE BUDGET, KEEP SEPARATE ACCOUNT OF EXPENSES

Budget Committee	Budget Forms by year
------------------	----------------------


6. PREPARE STATUS REPORTS FOR MEETINGS AND NEWSLETTER

Member #4	Monthly
-----------	---------

Attachments

F-37 Chapter Record of Membership

(front)

 NARFE <small>National Active and Retired Federal Employees Association</small>	CHAPTER RECORD OF MEMBERSHIP	
	Mr. Mrs. Miss Ms. _____	_____ Print name (last, first, MI)
_____ Street Address	_____ Date of Birth	
_____ City, State, Zip Code	_____ NARFE Membership #	
Eligibility for NARFE Membership:		
<input type="checkbox"/> Retirees _____ (Dept. or Agency)		
<input type="checkbox"/> Former employees		
<input type="checkbox"/> Current employees		
<input type="checkbox"/> Spouses and surviving spouses of those eligible to join NARFE		
<input type="checkbox"/> Former spouses who are legally eligible for a federal annuity		
Indicate how dues are paid:		
<input type="checkbox"/> Annual payment		
Month due: _____		
<input type="checkbox"/> Dues withholding		
<input type="checkbox"/> Life member		
<input type="checkbox"/> Honorary member		
_____ CSA or CSF Number	_____ Signature	_____ Date

(back)

OPTIONAL RECORD OF DUES		
DATE	CHAPTER DUES	NATIONAL DUES
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

F-37 (02/02)

F-38 Treasurer's Monthly Report



Treasurer's Monthly Report

CHAPTER NUMBER _____

LOCATION _____

PERIOD ENDING _____

Receipts*

	Balance on Hand - Last Report	\$ _____
Savings (Long term)	\$ _____	
Total dues collected	\$ _____	
Monies received from Ways and Means committee activities	\$ _____	
For special projects such as programs ads, etc. (itemize)	\$ _____	
Birthday and anniversary fund	\$ _____	
Miscellaneous (itemize)	\$ _____	
	Total Receipts	\$ _____
	Total to be accounted for	\$ _____

Disbursements*

To National Office for dues collected	\$ _____
To Federation Treasurer for dues	\$ _____
Office/Officer expenses (itemize)	\$ _____
Other office expenses	\$ _____
Disbursements of special collections	\$ _____
Chapter newsletter/bulletin printing and copying expenses	\$ _____
Miscellaneous (itemize)	\$ _____
	Total Disbursements
	Total to be accounted for

Obligations*

Dues to be remitted to National	\$ _____
Federation dues to be remitted	\$ _____
Second year members	\$ _____
Third year members	\$ _____
Other obligations (itemize)	\$ _____
Estimated routine expenses next month	\$ _____
	Total Obligations
	Balance on hand for use

Auditing committee, chapter	9
Anniversary certificates, chapter	22
Appendices	25-32
Attachments (forms)	35
Awards	22
Banner, NARFE	23
Bulk mailing permit	11
Bylaws, national	3, 6, 14, 16
Certificates	
Chapter anniversary	22
Distinguished service	22
Chapter	
Bylaws	3
Charter	16
Charter, reconstructed	17
Closing	17
Constitution	3
Election	6
Files	6, 26
General correspondence	4, 27
Meeting	10
New	16
Newsletter	11
Officers' duties	3
Reactivating	17
Stationery	11
Supplies	4
Chapter committees	
Auditing	9
Executive	7
Legislative	8
Membership	7
Nominating	7
Operations	10, 28
Program	9
Public Relations	9
Social	9
Sunshine	9
Telephone	9
Ways & Means	10
Chapter funds disposition	
Deposit	4
Disbursement, reported	4
Dues	4, 16
Chapter membership – benefits	2
Chapter membership, plan	7, 30
Committees, chapter	7
Communications, newsletter	11
Constitution and bylaws	
Chapter	3
Federation	14
Convention, national	20, 21, 22
Delegate role and expenses	21
Resolutions	22
Time & place	20
Death of a member, reporting (F-9)	4
Distribution code, printed matter	12
District officers, federation	15
Dues, national and chapter	4, 5
Remit to national headquarters	4, 5
Use of F-16 and F-16R	4, 5
Election, chapter	6
Escrow, closed chapter funds	17
Federation	
Closing a chapter	17
District boundaries	15
Officers' duties	14, 15
Organizing a new chapter	16
Financial records, chapter	4, 5
Forms	
DW-2	4
F-7 Officer Roster, Chapter	3
F-7A Officer Roster, Federation	14, 15
F-9 Death of a Member, Notification	4
F-16 Dues Transmittal Sheet, New Members	4, 16
F-16R Dues Transmittal Sheet, Renewals	4, 16
F-19 Chapter Charter Application	17
F-21 Chapter Constitution and Bylaws (standard)	17
F-22 Federation Convention Report	15
F-37 Record of Dues Payment	4, 5, 36
F-38 Treasurer's Monthly Report	37
F-46 Changes to LSA Assignments	7, 8
FH-4 National Bylaws	3, 14
FH-9 Public Relations Handbook	5, 9
FH-10 Service Officer Guide	5
Historian, chapter duties	6
Installation of officers	20

IRS letter, 22 June 1970	11	Secretary	3
LSA (Logistic support area)	8, 16	Service officer	5
Legislative committee, chapter	8	Treasurer	4
Mailing permit, bulk	11	Vice president	3
Membership recruitment and retention	7, 8	Officers, federation	14, 15
Meeting, chapter	10	District	15
Meritorious service certificates	22	First vice president	14
NARFE•Mart	4, 20	President	14
National bylaws	3, 6, 14	Second vice president	15
National convention	20, 21, 22	Secretary	15
Banquet	22	Treasurer	15
Convention resolutions	22	Officers, installation	20
Delegate role and expenses	21	Parliamentarian, duties	6
Hotel rooms	22	Parliamentary rules, purpose	3, 6
NARFE magazine	22	Plaques, NARFE awards	22
Proxies, notice	21	President, chapter	3
Registering, notice	21	President, federation	14
Representation	20	Program committee, chapter	9
Resolutions	22	Public relations officer, chapter	5, 9
Sessions	22	Public relations committee	5, 9
Time and Place	20	Reactivating a chapter	17
New chapter		Records, financial, chapter	4, 5
Kit	16	Records, management	26
Number	17	Rules - parliamentary order and procedure	6
Organizing	16	Secretary, chapter	3
Newsletter, chapter	11	Secretary, federation	15
Nominating committee, chapter	7	Second vice president, chapter	3
Non-profit organization		Second vice president, federation	15
identification number	4, 11, 15	Service center clearinghouse	12
Officer roster, F-7	3	Service officer, chapter	5
Officer roster, F-7A	14, 15	Social committee, chapter	9
Officers, chapter	3	Stationery, chapter	11
Chaplain	6	Sunshine committee, chapter	9
Financial secretary	4	Supplies	3
First vice president	3	Telephone committee, chapter	9
Election	6	Ten percent funds, service center expenses	12
Installation	20	Training pamphlets	3
Historian	6	Treasurer, chapter	4, 5
New	7	Treasurer, federation	15
Parliamentarian	6	Ways and means committee, chapter	10
President	3	ZIP codes, LSA	8, 16
Public relations	5, 9		
Reporting to national headquarters	3, 4		
Second vice president	3		



NARFE
PROTECTING YOUR FUTURE

606 North Washington Street
Alexandria, Virginia
1-800-627-3394
www.narfe.org

How to Contact NARFE

Recruitment & Retention 1-800-627-3394

PRS kits and information, Member-Get-A-Member and R&R issues

Member Records 1-800-456-8410

Report address changes, notification of death, chapter transfers, roster updates and corrections and billing inquiries

NARFE 1-703-838-7760

All other calls including Retirement Benefits

Supply orders (Form F-18) should go directly to the NARFE mailroom. You can e-mail them to mailorder@narfe.org or fax them to 703-838-7781.

Blank forms can be found at our Web site, www.narfe.org.